

Ref #	Hits	Search Query	DBs	Default Operator	Plurals	Time Stamp
S2	1	("2005001527").PN.	US-PGPUB	OR	OFF	2005/03/19 19:17
S5	117	(manag\$4 acquir\$3 acquisition procur\$4 purchas\$3 buy\$3 contract\$3 shopping accessing negotiat\$3 bid\$4) SAME (employee employment worker labor personal personnel (human ADJ resource) hr professional work\$force) SAME (br benefits insurance (saving option stock ADJ options pension retirement 401k credit) NEAR3 plans (flexible ADJ spending)) SAME real\$time	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/07 20:34
S6	4314	(receiv\$3 receipt acquir\$3 acquisition accessing obtain\$3 provid\$3 provision) SAME (benefit insurance pension retirement 401k flexible ADJ spending) SAME (requirement specification description parameter needs component) SAME (employer sponsor provider workplace company corporat\$4 business agency)	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/07 20:19
S7	2858	(transmit\$4 send\$3 giv\$3 provid\$3 provision) SAME (benefit insurance pension retirement 401k flexible ADJ spending) SAME (requirement specification description parameter needs component) SAME (provider insurance ADJ company agency hmo ppo)	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/07 20:29
S8	245259	(receiv\$3 receipt acquir\$3 acquisition accessing obtain\$3 provid\$3 provision) SAME (bid offer tender propos\$3)	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/07 20:18
S9	51292	(receiv\$3 receipt acquir\$3 acquisition accessing obtain\$3 provid \$3provision) SAME (br authorization authoris\$4 accept\$4 approv\$3 agree\$4 permission consent\$4) AND (employer sponsor provider workplace company corporat\$4 business agency) AND (br benefit insurance pension retirement 401k flexibleADJspending)	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/07 20:31

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S10	6556	(transmit\$4 send\$3 giv\$3 provid\$3 provision) SAME (authorization authoris\$4 accept\$4 approv\$3 agree\$4 permission consent\$4) AND (benefit insurance pension retirement 401k flexible ADJ spending) SAME (provider insurance ADJ company agency hmo ppo)	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/07 20:32
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S18	231	S13 AND S12 AND S14 AND S15 AND S16 AND S17	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/07 21:06
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S21	103	S13 SAME S12 AND S14 AND S15 AND S16 AND S17	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/07 21:47

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S22	92	S13 SAME S12 SAME S14 AND S15 AND S16 AND S17	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/07 21:28
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S26	2	(("20020149616") or ("20010037214").PN.	US-PGPUB; USPAT	OR	OFF	2005/03/14 12:51
S29		warady.in. <i>CONFIDENTIAL PENNOS ORIGINATOR</i>	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/09 14:59
S31	3254	electronic ADJ signature	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 12:53
S32	728	705/4.ccls.	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 13:11
S33	19	S31 and S32	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 12:54
S37	245901	(receiv\$3 receipt acquir\$3 acquisition accessing obtain\$3 provid\$3 provision) SAME (bid offer tender propos\$3)	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 12:54
S39	6578	(transmit\$4 send\$3 giv\$3 provid\$3 provision) SAME (authorization authori\$4 accept\$4 approv\$3 agrees\$4 permission consent\$4) AND (benefit insurance pension retirement 401k flexible ADJ spending) SAME (provider insurance ADJ company agency hmo ppo)	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 12:54
S45	4401	(705/50-80).CCLS.	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	OFF	2005/03/14 13:09

S47	263	S31 and S45	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 13:10
S50	2669	705/2-4.ccls. <i>(03510923)</i>	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 13:11
S51	14	S47 and S50 <i>(03510923)</i>	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 13:19
S54	2	(("4,326,098") or ("4,351,982")). PN.	USPAT	OR	OFF	2005/03/14 17:39
S55	547887	"32" and "51" and "54"	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 17:40
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S63	4	S61 and S62	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 17:41
S64	2	(("4,326,098") or ("4,351,982")). PN.	USPAT	OR	OFF	2005/03/14 17:41
S66 <i>CON 1203109 11/12</i>	25	S59 or S63 or S64	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 17:42
S69	2449	(receiv\$3 receipt obtain\$3) WITH electronic WITH payment	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 17:48
S70	622	(receiv\$3 receipt obtain\$3) WITH electronic ADJ payment	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 17:53
S71	126	(receiv\$3 receipt obtain\$3) ADJ electronic ADJ payment	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 17:49
S72	4337	(receiv\$3 receipt acquir\$3 acquisition accessing obtain\$3 provid\$3 provision) SAME (benefit insurance pension retirement 401k flexible ADJ spending) SAME (requirement specification description parameter needs component) SAME (employer sponsor provider work\$place company corporat\$4 business agency)	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 17:50
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S80	276	(request\$3) WITH electronic ADJ payment	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 17:55
<i>Considered Testles</i>		34 S71 and S80	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 17:54
S82	58	(request\$3) ADJ electronic ADJ payment	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 17:55

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S83	7	S71 and S82	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/14 17:55
S85	117	change ADJ benefits	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/18 10:38
S86	375	employee ADJ benefits	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/18 10:38
S87	14	<i>CONSIDERED TAKEN, PESTIMATES</i> S85 AND S86	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/18 10:38
S98	3	<i>CONSIDERED TAKEN, PESTIMATES</i> ((employee ADJ benefit) AND (health) AND (life) AND saving AND (stock OR (stock ADJ option)) AND pension AND 401k AND (credit OR (credit ADJ union)))	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/19 19:45
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S101	5	((employee ADJ benefit) AND (health) AND (life) AND saving AND (stock OR (stock ADJ option)) AND pension AND 401k)	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/19 19:48
S102	9	((employee ADJ benefit) AND (health) AND (life) AND (stock OR (stock ADJ option)) AND pension AND 401k)	US-PGPUB; USPAT; EPO; JPO; DERWENT; IBM_TDB	OR	ON	2005/03/19 19:52
S103	1	"20040172268"	US-PGPUB	OR	ON	2005/03/20 18:19



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UltraLink, Formerly iBenefits, is Named as One of Eight Top Emerging ASPs by "Computerworld" Magazine

Business Editors. Business Wire. New York: Nov 21, 2000. pg. 1

Companies: UltraLink (NAICS: 524292)

Author(s): Business Editors

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Abstract (Document Summary)

"It is an honor for iBenefits to have been named one of "Computerworld's" top emerging ASPs," said Jeff Graves, founder and CEO of iBenefits, now CEO of UltraLink. "Now, as UltraLink, we are leading this industry's expansion beyond the ASP model. For clients who are not ready to manage their benefits completely online, we are now able to offer a stepping stone to Web-based benefits solutions.

UltraLink recently attracted national attention for introducing an online, reverse-auction benefit procurement application, UltraLink Exchange(TM), which was tested by client American Airlines, reducing the employer's renewal process from months to only a few weeks. UltraLink Exchange is now being offered to employers for their 2001 plan renewal and vendor selection.

The product of a recent merger between ASP iBenefits, Inc. and health plan manager UltraLink, LLC, the company brings accuracy and access to the data-driven benefits management process. UltraLink streamlines communication and transactions between employees, employers, brokers, consultants, insurance carriers and third party administrators.

Full Text (533 words)

Copyright Business Wire Nov 21, 2000

COSTA MESA, Calif.--(BUSINESS WIRE)--Nov. 21, 2000--UltraLink, formerly iBenefits, a leader in the Internet-based employee benefits services industry, today announced it has been named one of eight top emerging ASPs (application service providers) by "Computerworld" magazine.

The ranking comes as part of "Computerworld's" list, "Emerging Companies 2001: 100 Companies to Watch," which includes new businesses for both consumers and investors to watch in the coming year.

Companies generally named to this list have made significant contributions to the IT industry and corporate computing. To qualify as an emerging company the organization must be a corporate IT-focused, for-profit venture with revenues of less than \$250 million.

Additionally, the company must have been founded no earlier than 1995, and must have customer references and a product or service available by Dec. 31, 2000.

"It's an honor for iBenefits to have been named one of "Computerworld's" top emerging ASPs," said Jeff Graves, founder and CEO of iBenefits, now CEO of UltraLink. "Now, as UltraLink, we are leading this industry's expansion beyond the ASP model. For clients who are not ready to manage their benefits completely online, we are now able to offer a stepping stone to Web-based benefits solutions.

"In addition to our easy-to-use online applications, UltraLink now provides broader access to our benefit management tools, via IVR and consolidated paper-based methods. Our goal is to bring clients onto the Net in a way that is comfortable for them."

UltraLink's scalable, proprietary applications -- iElect(TM) for benefits enrollment and iAdmin(TM) for administration -- allow employees to learn about and enroll in benefits from their personal computers, while giving employers and their brokers the tools to manage, communicate and document benefits information online.

Additionally, both iElect and iAdmin can interface with most existing HRIS and ERP systems to synchronize all employee data. Employee benefit selections, eligibility criteria and other data can also be uploaded from the UltraLink database to insurance carriers who accept the data electronically, reducing data entry expense, employee eligibility errors and premium billing inaccuracies.

UltraLink recently attracted national attention for introducing an online, reverse-auction benefit procurement application, UltraLink Exchange(TM), which was tested by client American Airlines, reducing the employer's renewal process from months to only a few weeks. UltraLink Exchange is now being offered to employers for their 2001 plan renewal and vendor selection.

"We feel that potential clients and investors 'watching' UltraLink in 2001 will be impressed by our ability to introduce new innovations, without sacrificing the solid customer service that users of our core applications have been experiencing since 1996," noted Graves. "We realize that growth means nothing these days without the ability to retain customers, and provide secure and reliable technology."

About UltraLink

With headquarters in Costa Mesa, Calif., UltraLink provides technology and full-service solutions that reduce the pain and cost of employee benefits procurement, enrollment and administration for employers ranging from 200 employees, up to the Fortune 100.

The product of a recent merger between ASP iBenefits, Inc. and health plan manager UltraLink, LLC, the company brings accuracy and access to the data-driven benefits management process. UltraLink streamlines communication and transactions between employees, employers, brokers, consultants, insurance carriers and third party administrators.

For more information about UltraLink, visit www.ultralink.com.

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The ABCs of ERP

Tracey Sutherland. *Accounting Education News*. Sarasota: Summer 2003. Vol. 31, Iss. 4; pg. 7

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Abstract (Document Summary)

ERP attempts to integrate all departments and functions across a company onto a single computer system that can serve all those different departments' particular needs. ERP vanquishes the old stand-alone computer systems in finance, HR, manufacturing and the warehouse, and replaces them with a single unified software program divided into software modules that roughly approximate the old stand-alone systems. ERP's best hope for demonstrating value is as a sort of battering ram for improving the way a company takes a customer order and processes it into an invoice and revenue - otherwise known as the order fulfillment process. The important thing is not to focus on how long it will take - real transformational ERP efforts usually run between one and three years, on average. e-Commerce means IT departments need to build two new channels of access into ERP systems - one for customers (otherwise known as business-to-consumer) and one for suppliers and partners (business-to-business). These two audiences want two different types of information from the ERP system. Consumers want order status and billing information, and suppliers and partners want just about everything else.

Full Text (4197 words)

Copyright American Accounting Association Summer 2003

Christopher Koch, Senior Editor, CIO.com Written for an audience of potential users of ERP systems, this article presents a fairly simple overview of the potential challenges and benefits for businesses implementing ERP systems. After a brief introduction of the concept, the author discusses such topics as the most common ERP implementation strategies, how long and how expensive ERP implementations can be, why ERP implementations fail, and how ERP fits with e-commerce. CIO.com is a website for Chief Information Officers and other information executives.

What is ERP?

Enterprise resource planning software, or ERP, doesn't live up to its acronym.

Forget about planning-it doesn't do much of that-and forget about resource, a throwaway term. But remember the enterprise part. This is ERP's true ambition. It attempts to integrate all departments and functions across a company onto a single computer system that can serve all those different departments' particular needs.

That is a tall order, building a single software program that serves the needs of people in finance as well as it does the people in human resources and in the warehouse. Each of those departments typically has its own computer system optimized for the particular ways that the department does its work. But ERP combines them all together into a single, integrated software program that runs off a single database so that the various departments can more easily share information and communicate with each other . . .

Take a customer order, for example. Typically, when a customer places an order, that order begins a mostly paper-based journey from in-basket to in-basket around the company, often being keyed and re-keyed into different departments' computer systems along the way. All that lounging around in in-baskets causes delays and lost orders, and all the keying into different computer systems invites errors. Meanwhile, no one in the company truly knows what the status of the order is at any given point because there is no way for the finance department, for example, to get into the warehouse's computer system to see whether the item has been shipped. "You'll have to call the warehouse" is the familiar refrain heard by frustrated customers.

ERP vanquishes the old stand-alone computer systems in finance, HR, manufacturing and the warehouse, and replaces them with a single unified software program divided into software modules that roughly approximate the old stand-alone systems. Finance, manufacturing and the warehouse all still get their own software, except now the software is linked together so that someone in finance can look into the warehouse software to see if an order has been shipped. Most vendors' ERP software is flexible enough that you can install some modules without buying the whole package . . .

How can ERP improve a company's business performance?

ERP's best hope for demonstrating value is as a sort of battering ram for improving the way [a] company takes a customer order and processes it into an invoice and revenue—otherwise known as the order fulfillment process. That is why ERP is often referred to as back-office software. It doesn't handle the up-front selling process (although most ERP vendors have recently developed CRM [Customer Relationship Management] software to do this); rather, ERP takes a customer order and provides a software road map for automating the different steps along the path to fulfilling it. When a customer service representative enters a customer order into an ERP system, he has all the information necessary to complete the order (the customer's credit rating and order history from the finance module, the company's inventory levels from the warehouse module and the shipping docks trucking schedule from the logistics module, for example).

People in these different departments all see the same information and can update it. When one department finishes with the order it is automatically routed via the ERP system to the next department . . . With luck, the order process moves like a bolt of lightning through the organization, and customers get their orders faster and with fewer errors than before. ERP can apply that same magic to the other major business processes, such as employee benefits or financial reporting. That, at least, is the dream of ERR. The reality is much harsher.

Let's go back to those in-boxes for a minute. That process may not have been efficient, but it was simple. Finance did its job, the warehouse did its job, and if anything went wrong outside of the department's walls, it was somebody else's problem. Not anymore. With ERP the customer service representatives are no longer just typists . . . The ERP screen makes them business people. It flickers with the customer's credit rating from the finance department and the product inventory levels from the warehouse. Will the customer pay on time? Will we be able to ship the order on time? These are decisions that customer service representatives have never had to make before, and the answers affect the customer and every other department in the company. But it's not just the customer service representatives who have to wake up. People in the warehouse who used to keep inventory in their heads or on scraps of paper now need to put that information online. If they don't, customer service reps will see low inventory levels on their screens and tell customers that their requested item is not in stock. Accountability, responsibility and communication have never been tested like this before.

People don't like to change . . . that is why the value of ERP is so hard to pin down. The software is less important than the changes companies make in the ways they do business. If you use ERP to improve the ways your people take orders, manufacture goods, ship them and bill for them, you will see value from the software. If you simply install the software without changing the ways people do their jobs, you may not see any value at all . . .

How long will an ERP project take?

Companies that install ERP do not have an easy time of it. Don't be fooled when ERP vendors [talk] about a three- or sixmonth average implementation time. Those short (that's right, six months is short) implementations all have a catch of one kind or another: the company was small, or the implementation was limited to a small area of the company, or the company used only the financial pieces of the ERP system (in which case the ERP system is nothing more than a very expensive accounting system). To do ERP right, the ways you do business will need to change and the ways people do their jobs will need to change too . . .

The important thing is not to focus on how long it will take—real transformational ERP efforts usually run between one and three years, on average—but rather to understand why you need it and how you will use it to improve your business.

What will ERP fix in my business?

There are five major reasons why companies undertake ERP. Integrate financial information-As the CEO tries to understand the Company's overall performance, he may find many different versions of the truth. Finance has its own set of revenue numbers, sales has another version, and the different business units may each have their own version of how much they contributed to revenues. ERP creates a single version of the truth that cannot be questioned because everyone is using the same system.

Integrate customer order information-ERP systems can become the place where the customer order lives from the time a customer service representative receives it until the loading dock ships the merchandise and finance sends an invoice. By having this information in one software system, rather than scattered among many different systems that can't communicate with one another, companies can keep track of orders more easily and coordinate manufacturing, inventory and shipping among many different locations at the same time.

Standardize and speed up manufacturing processes-Manufacturing companies-especially those with an appetite for mergers and acquisitions-often find that multiple business units across the company make the same widget using different methods and computer systems. ERP systems come with standard methods for automating some of the steps of a manufacturing process. Standardizing those processes and using a single, integrated computer system can save time, increase productivity and reduce head count.

Reduce inventory-ERP helps the manufacturing process flow more smoothly, and it improves visibility of the order fulfillment process inside the company. That can lead to reduced inventories of the stuff used to make products (work-in-progress inventory), and it can help users better plan deliveries to customers, reducing the finished good inventory at the warehouses and shipping docks. To really improve the flow of your supply chain, you need supply chain software, but ERP helps too.

Standardize HR information-Especially in companies with multiple business units, HR may not have a unified, simple method for tracking employees' time and communicating with them about benefits and services. ERP can fix that. In the race to fix these problems, companies often lose sight of the fact that ERP packages are nothing more than generic representations of the ways a typical company does business. While most packages are exhaustively comprehensive, each industry has quirks that make it unique. Most ERP systems were designed to be used by discrete manufacturing companies (that make physical things that can be counted), which immediately left all the process manufacturers (oil, chemical, and utility companies that measure their products by flow rather than individual units) out in the cold. Each of these industries has struggled with the different ERP vendors to modify core ERP programs to their needs.

Will ERP fit the ways I do business?

It's critical for companies to figure out if their ways of doing business will fit within a standard ERP package before . . . implementation begins. The most common reason that companies walk away from multimillion-dollar ERP projects is that they discover the software does not support one of their important business processes. At that point there are two things they can do: They can change the business process to accommodate the software, which will mean deep changes in long-established ways of doing business (that often provide competitive advantage) and shake up important people's roles and responsibilities . . . Or they can modify the software to fit the process, which will slow down the project, introduce dangerous bugs into the system and make upgrading the software to the ERP vendors next release excruciatingly difficult because the customizations will need to be torn apart and rewritten to fit with the new version.

Needless to say, the move to ERP is a project of breathtaking scope, and the price tags on the front end are enough to make the most placid CFO a little twitchy. In addition to budgeting for software costs, financial executives should plan to write checks to cover consulting, process rework, integration testing and a long laundry list of other expenses before the benefits of ERP start to manifest themselves. Underestimating the price of teaching users their new job processes can lead to a rude shock down the line, and so can failure to consider data warehouse integration requirements and the cost of extra software to duplicate the old report formats . . .

What does ERP really cost?

Meta Group recently did a study looking at the total cost of ownership (TCO) of ERP, including hardware, software, professional services and internal staff costs. The TCO numbers include getting the software installed and the two years afterward, which is when the real costs of maintaining, upgrading and optimizing the system for your business are felt. Among the 63 companies surveyed-including small, medium and large companies in a range of industries-the average TCO was \$15 million (the highest was \$300 million and lowest was \$400,000). While it's hard to draw a solid number from that kind of range of companies and ERP efforts, Meta came up with one statistic that proves that ERP is expensive no matter what kind of company is using it. The TCO for a "heads-down" user over that period was a staggering \$53,320.

When will I get payback from ERP-and how much will it be?

Don't expect to revolutionize your business with ERP. It is a navel-gazing exercise that focuses on optimizing the way things are done internally rather than with customers, suppliers or partners. Yet the navel gazing has a pretty good payback if you're willing to wait for it—a Meta Group study of 63 companies found that it took eight months after the new system was in (31 months total) to see any benefits. But the median annual savings from the new ERP system were \$ 1.6 million.

What are the hidden costs of ERP?

Although different companies will find different land mines in the budgeting process, those who have implemented ERP packages agree that certain costs are more commonly overlooked or underestimated than others. Armed with insights from across the business, ERP pros vote the following areas as most likely to result in budget overrun.

1. Training

Training is the near-unanimous choice of experienced ERP implementers as the most underestimated budget item. Training expenses are high because workers almost invariably have to learn a new set of processes, not just a new software interface. Worse, outside training companies may not be able to help you ... Prepare to develop a curriculum yourself that identifies and explains the different business processes that will be affected by the ERP system.

One enterprising CIO hired staff from a local business school to help develop and teach the ERP business-training course to employees. Remember that with ERP finance people will be using the same software as warehouse people and they will both be entering information that affects the other. To do this accurately, they have to have a much broader understanding of how others in the company do their jobs ... So take whatever you have budgeted for ERP training and double or triple it up front. It will be the best ERP investment you ever make.

2. Integration and testing

Testing the links between ERP packages and other corporate software links that have to be built on a case-by-case basis is another often-underestimated cost. A typical manufacturing company may have add-on applications from the major e-commerce and supply chain, to the minor sales tax computation and bar coding. All require integration links to ERP. If you can buy add-ons from the ERP vendor that are pre-integrated, you're better off. If you need to build the links yourself, expect things to get ugly. As with training, testing ERP integration has to be done from a process-oriented perspective ...

3. Customization

Add-ons are only the beginning of the integration costs of ERP. Much more costly, and something to be avoided if at all possible, is actual customization of the core ERP software itself ... Upgrading the ERP package—no walk in the park under the best of circumstances—becomes a nightmare because you'll have to do the customization all over again in the new version. Maybe it will work, maybe it won't. No matter what, the vendor will not be there to support you ...

4. Data conversion

It costs money to move corporate information, such as customer and supplier records, product design data and the like, from old systems to new ERP homes ...

5. Data analysis

Often, the data from the ERP system must be combined with data from external systems for analysis purposes. Users with heavy analysis needs should include the cost of a data warehouse in the ERP budget—and they should expect to do quite a bit of work to make it run smoothly. Users are in a pickle here: Refreshing all the ERP data every day in a big corporate data warehouse is difficult, and ERP systems do a poor job of indicating which information has changed from day to day, making selective warehouse updates tough ...

6. Consultants ad infinitum

When users fail to plan for disengagement, consulting fees run wild. To avoid this, companies should identify objectives for which its consulting partners must aim when training internal staff. Include metrics in the consultants' contract; for example, a specific number of the user company's staff should be able to pass a project-management leadership test ...

7. Replacing your best and brightest

It is accepted wisdom that ERP success depends on staffing the project with the best and brightest from the business and IS divisions. The software is too complex and the business changes too dramatic to trust the project to just anyone. The bad news is a company must be prepared to replace many of those people when the project is over. Though the ERP market is not as hot as it once was, consultancies and other companies that have lost their best people will be hounding yours ... Huddle with HR early on to develop a retention bonus program and create new salary strata for ERP veterans. If you let them go, you'll wind up hiring them-or someone like them-back as consultants for twice what you paid them in salaries.

8. Implementation teams can never stop

Most companies intend to treat their ERP implementation as they would any other software project. Once the software is installed, they figure the team will be scuttled and everyone will go back to his or her day job. But after ERP, you can't go home again. The implementers are more valuable. Because they have worked intimately with ERP they know more about the sales process than the salespeople and more about the manufacturing process than the manufacturing people. Companies can't afford to send their project people back into the business because there's so much to do after the ERP software is installed ... Unfortunately, few IS departments plan for the frenzy of post-ERP installation activity ... Many are forced to beg for more money and staff immediately after the go-live date, long before the ERP project has demonstrated any benefit.

9. Waiting for ROI

One of the most misleading legacies of traditional software project management is that the company expects to gain value from the application as soon as it is installed, while the project team expects a break and maybe a pat on the back. Neither expectation applies to ERP. Most of the systems don't reveal their value until after companies have had them running for some time and can concentrate on making improvements in the business processes that are affected by the system ...

10. Post-ERP depression

ERP systems often wreak havoc in the companies that install them. In a recent Deloitte Consulting survey of 64 Fortune 500 companies, one in four admitted that they suffered a drop in performance when their ERP system went live. The true percentage is undoubtedly much higher. The most common reason for the performance problems is that everything looks and works differently from the way it did before ...

Why do ERP projects fail so often?

At its simplest level, ERP is a set of best practices for performing different duties in your company, including finance, manufacturing and the warehouse. To get the most from the software, you have to get people inside your company to adopt the work methods outlined in the software. If the people in the different departments that will use ERP don't agree that the work methods embedded in the software are better than the ones they currently use, they will resist using the software or will want IT to change the software to match the ways they currently do things. This is where ERP projects break down. Political fights break out over how-or even whether-the software will be installed. IT gets bogged down in long, expensive customization efforts to modify the ERP software to fit with powerful business barons' wishes. Customizations make the software more unstable and harder to maintain when it finally does come to life. The horror stories you hear in the press about ERP can usually be traced to the changes the company made in the core ERP software to fit its own work methods ...

But IT can fix the bugs pretty quickly in most cases, and besides, few big companies can avoid customizing ERP in some fashion-every business is different and is bound to have unique work methods that a vendor cannot account for when developing its software. The mistake companies make is assuming that changing peoples habits will be easier than customizing the software. It's not. Getting people inside your company to use the software to improve the ways they do their jobs is by far the harder challenge. If your company is resistant to change, then your ERP project is more likely to fail.

How do companies organize their ERP projects?

Based on our observations, there are three commonly used ways of installing ERP

The Big Bang-In this, the most ambitious and difficult of approaches to ERP implementation, companies cast off all their legacy systems at once and install a single ERP system across the entire company. Though this method dominated early ERP implementations, few companies dare to attempt it anymore ... Most of the ERP implementation horror stories from the late '90s

*warn us about companies that used this strategy. Getting everyone to cooperate and accept a new software system at the same time is a tremendous effort, largely because the new system will not have any advocates. No one within the company has any experience using it, so no one is sure whether it will work. Also, ERP inevitably involves compromises. Many departments have computer systems that have been honed to match the ways they work. In most cases, ERP offers neither the range of functionality nor the comfort of familiarity that a custom legacy system can offer. In many cases, the speed of the new system may suffer because it is serving the entire company rather than a single department ...

Franchising strategy-This approach suits large or diverse companies that do not share many common processes across business units. Independent ERP systems are installed in each unit, while linking common processes, such as financial bookkeeping, across the enterprise. This has emerged as the most common way of implementing ERP. In most cases, the business units each have their own "instances" of ERP—that is, a separate system and database. The systems link together only to share the information necessary for the corporation to get a performance big picture across all the business units (business unit revenues, for example), or for processes that don't vary much from business unit to business unit (perhaps HR benefits). Usually, these implementations begin with a demonstration or pilot installation in a particularly open-minded and patient business unit ... Once the project team gets the system up and running and works out all the bugs, the team begins selling other units on ERP using the first implementation as a kind of in-house customer reference. Plan for this strategy to take a long time.

Slam dunk-ERP dictates the process design in this method, where the focus is on just a few key processes, such as those contained in an ERP system's financial module. The slam dunk is generally for smaller companies expecting to grow into ERP. The goal here is to get ERP up and running quickly and to ditch the fancy reengineering in favor of the ERP system's "canned" processes. Few companies that have approached ERP this way can claim much payback from the new system. Most use it as an infrastructure to support more diligent installation efforts down the road. Yet many discover that a slammed-in ERP system is little better than a legacy system because it doesn't force employees to change any of their old habits ...

e-Commerce means IT departments need to build two new channels of access into ERP systems—one for customers (otherwise known as business-to-consumer) and one for suppliers and partners (business-to-business). These two audiences want two different types of information from your ERP system. Consumers want order status and billing information, and suppliers and partners want just about everything else ...

The full text of this article is available at <http://www.cio.com/research/erp/edit/erpbasics.html>

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